



Filing ID #10026708

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Mike Levin  
**Status:** Member  
**State/District:** CA49

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2018  
**Filing Date:** 05/5/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 401(k) ⇒ BlackRock LifePath Index 2040 Fund [MF]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Fidelity Capital & Income Fund [MF]	SP	\$1,001 - \$15,000	None		
Fidelity IRA ⇒ Fidelity Diversified International Fund [MF]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Fidelity Freedom 2040 Fund [MF]	SP	\$250,001 - \$500,000	None		
Fidelity IRA ⇒ Fidelity OTC Portfolio [MF]	SP	\$100,001 - \$250,000	None		
Fidelity IRA ⇒ Fidelity Real Estate Income Fund [MF]	SP	\$1,001 - \$15,000	None		
Fidelity IRA ⇒ Fidelity Select Biotechnology Portfolio [MF]	SP	\$15,001 - \$50,000	None		
Fidelity IRA ⇒		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Select Environmental and Alternative Energy Portfolio [MF]					
Fidelity IRA ⇒ Heartland Value Plus Investor Fund [MF]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Janus Henderson Enterprise Fund [MF]	SP	\$15,001 - \$50,000	None		
Fidelity IRA ⇒ JP Morgan Small Cap Core Fund [MF]	SP	\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Oakmark International Fund [MF]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Yacktman Focused Fund [MF]		\$15,001 - \$50,000	None		
US Bank [BA]		\$15,001 - \$50,000	None		
Vanguard 529 ⇒ Vanguard Aggressive Growth Portfolio [MF]	DC	\$15,001 - \$50,000	None		
Vanguard 529 ⇒ Vanguard Growth Index Portfolio [MF]	DC	\$15,001 - \$50,000	None		
Vanguard 529 ⇒ Vanguard Mid-Cap Index Portfolio [MF]	DC	\$15,001 - \$50,000	None		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
House of Representatives	Salary	\$72,500.00	N/A
Irvine Company	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Fidelity 401(k)
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Vanguard 529 (Owner: DC)  
LOCATION: NV

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Hon. Mike Levin , 05/5/2019